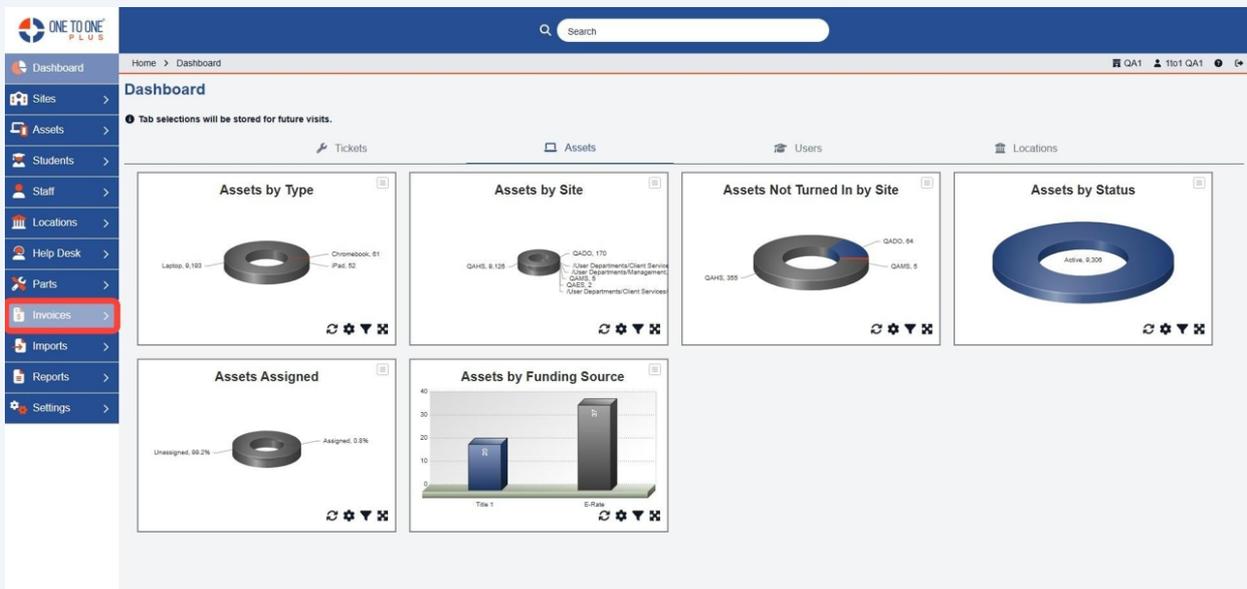


# Add a New Invoice



This guide offers a simple, step-by-step process for creating and managing invoices efficiently. It helps users easily generate, save, and share invoices, streamlining workflow and boosting productivity.

## 1 Select "Invoices".



## 2 Select "Add New Invoice".

The screenshot shows the ONE TO ONE PLUS dashboard. The sidebar on the left contains navigation options: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Manage, Add New Invoice (highlighted with a red box), Add New Payment, Bulk Invoicing, Imports, Reports, and Settings. The main dashboard area displays several charts: 'Assets by Type' (donut chart showing Laptop: 9.10%, Chromebook: 61, and iPad: 52); 'Assets by Site' (donut chart showing QAHS: 9.12% and QAHO: 170); 'Assets Not Turned In by Site' (donut chart showing QAHS: 39% and QAHS: 5); 'Assets by Status' (donut chart showing Active: 9.30%); 'Assets Assigned' (donut chart showing Unassigned: 99.2% and Assigned: 0.8%); and 'Assets by Funding Source' (bar chart showing Title I and E-Rate).

## 3 Invoice ID will be auto generated.

The screenshot shows the 'Add Invoice' form in the ONE TO ONE PLUS system. The form is divided into three sections: 'Invoice Information', 'Invoice Details', and 'Claim History'. In the 'Invoice Information' section, the 'Invoice ID' field is highlighted with a red box and contains the text 'Leave Empty to Auto Generate'. Other fields in this section include 'Invoice Date' (01/14/2025), 'Due Amount' (0.00), 'Related user' (Select An Option), and 'Type' (Select An Option). The 'Invoice Details' section includes 'Due Date', 'Approved Date', 'Approved By' (Select An Option), 'Paid In Full Date', and 'Ticket' (Select An Option). There is also a '+ Custom Fields' section. A green 'Save' button is visible at the bottom left of the form area.

## 4 Select "Invoice Date".

The screenshot shows the 'Add Invoice' form in the ONE TO ONE PLUS system. The form is divided into three main sections: 'Invoice Information', 'Invoice Details', and 'Claim History'. The 'Invoice Information' section contains the following fields:

- Invoice ID: Leave Empty to Auto Generate
- Invoice Date: 01/14/2025 (highlighted with a red box)
- Due Amount: 0.00
- Related user: Select An Option
- Type: Select An Option
- Description: [Empty text area]

The 'Invoice Details' section contains the following fields:

- Due Date: [Empty text area]
- Approved Date: [Empty text area]
- Approved By: Select An Option
- Paid In Full Date: [Empty text area]
- Ticket: Select An Option

The 'Claim History' section is currently empty. There is a '+ Custom Fields' section at the bottom of the form.

On the left side, there is a navigation menu with options: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Manage, Add New Invoice, Add New Payment, Bulk Invoicing, Imports, Reports, and Settings. The 'Add New Invoice' button has a green checkmark and the text 'Save'.

## 5 Enter "Invoice Amount".

The screenshot shows the 'Add Invoice' form in the ONE TO ONE PLUS system. The 'Due Amount' field is highlighted with a red box and contains the value '20.00'. The 'Invoice Date' field now contains a calendar icon, indicating it is a date picker. The 'Description' field now contains the text 'Searching...'. The 'Approved By' field now contains a dropdown arrow, indicating it is a selection menu. The 'Paid In Full Date' field now contains a dropdown arrow, indicating it is a selection menu. The 'Ticket' field now contains a dropdown arrow, indicating it is a selection menu.

The 'Invoice Information' section contains the following fields:

- Invoice ID: Leave Empty to Auto Generate
- Invoice Date: 01/14/2025
- Due Amount: 20.00 (highlighted with a red box)
- Related user: Select An Option
- Type: [Empty text area]
- Description: Searching...

The 'Invoice Details' section contains the following fields:

- Due Date: [Empty text area]
- Approved Date: [Empty text area]
- Approved By: Select An Option
- Paid In Full Date: [Empty text area]
- Ticket: Select An Option

The 'Claim History' section is currently empty. There is a '+ Custom Fields' section at the bottom of the form.

On the left side, there is a navigation menu with options: Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Manage, Add New Invoice, Add New Payment, Bulk Invoicing, Imports, Reports, and Settings. The 'Add New Invoice' button has a green checkmark and the text 'Save'.

## 6 Select "Related User" to Invoice.

The screenshot shows the 'Add Invoice' form in the ONE TO ONE PLUS system. The form is divided into three main sections: Invoice Information, Invoice Details, and Claim History. The 'Related user' dropdown menu is highlighted with a red box, showing 'Burt Lancaster (ID: E00001)' selected. The 'Type' dropdown menu is also visible, showing 'Select An Option'.

Section	Field	Value
Invoice Information	Invoice ID	Leave Empty to Auto Generate
	Invoice Date *	01/14/2025
	Due Amount *	20.00
	Related user *	Burt Lancaster (ID: E00001)
	Type *	Select An Option
Invoice Details	Due Date	
	Approved Date	
	Approved By	Select An Option
	Paid In Full Date	
	Ticket	Select An Option

## 7 Select "Type" of invoice.

The screenshot shows the 'Add Invoice' form in the ONE TO ONE PLUS system. The form is divided into three main sections: Invoice Information, Invoice Details, and Claim History. The 'Type' dropdown menu is highlighted with a red box, showing 'Damages' selected. The 'Related user' dropdown menu is also visible, showing 'Burt Lancaster (ID: E00001)' selected.

Section	Field	Value
Invoice Information	Invoice ID	Leave Empty to Auto Generate
	Invoice Date *	01/14/2025
	Due Amount *	20.00
	Related user *	Burt Lancaster (ID: E00001)
	Type *	Damages
Invoice Details	Due Date	
	Approved Date	
	Approved By	Select An Option
	Paid In Full Date	
	Ticket	Select An Option

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Enter a "Description".

The screenshot shows the 'Add Invoice' form in the ONE TO ONE PLUS system. The form is divided into three main sections: 'Invoice Information', 'Invoice Details', and 'Claim History'. The 'Invoice Information' section includes fields for Invoice ID (with a 'Leave Empty to Auto Generate' option), Invoice Date (01/14/2025), Due Amount (20.00), Related user (Burt Lancaster), and Type (Damages). The 'Description' field is highlighted with a red box and contains the text 'missing key from keyboard'. The 'Invoice Details' section includes fields for Due Date, Approved Date, Approved By (a dropdown menu), Paid In Full Date, and Ticket (a dropdown menu). The 'Claim History' section is currently empty. A '+ Custom Fields' section is also visible. The left sidebar contains navigation options like Dashboard, Sites, Assets, Students, Staff, Locations, Help Desk, Parts, Invoices, Manage, Add New Invoice, Add New Payment, Bulk Invoicing, Imports, Reports, and Settings. A green 'Save' button is located in the top right corner of the form area.

9

Select "Save".

This screenshot is identical to the one above, showing the 'Add Invoice' form. The 'Description' field now contains the text 'missing key from keyboard'. The 'Save' button, located in the top right corner of the form area, is highlighted with a red box, indicating the next step in the process.

## 10 Select "Actions".

The screenshot shows the 'Edit Invoice' page for invoice INV-0001045941. The page is divided into several sections: 'Invoice Information', 'Invoice Details', and 'Claim History'. The 'Invoice Information' section includes fields for Invoice ID, Invoice Date, Related User, Due Date, Status, Type, and Description. The 'Invoice Details' section includes Invoice Amount, Balance, Approved Date, Approved By, and Ticket. The 'Claim History' section is currently empty. At the bottom of the page, there is a table for 'Payments' with columns for Payment ID, Description, Amount, Payment Date, Created, Modified, and Actions. The 'Actions' button in the top right corner is highlighted with a red box.

## 11 Select "Email", "Download", or "Print" for the invoice.

The screenshot shows the 'Preview Invoice' dialog box. The dialog displays the following information:

- QA1
- INVOICE**  
Invoice Date: 1/14/2025  
Invoice ID: INV-0001045941  
Due Date:
- Bill to the Parent/Guardian of:**  
Burt Lancaster
- Student ID:** E00001  
**School:**
- Asset ID:**  
**Asset Serial Number:**  
**Asset Type:**  
**Asset Model:**

Invoice Type	Description	Ticket ID	Ticket Type	Amount Due
Damages	missing key from keyboard			\$20.00

**Payments are due within 30 days!**  
**Please submit payments to:**

At the bottom of the dialog, the 'Email', 'Download', and 'Print' buttons are highlighted with a red box.